



**Identity Access Management**

# **CAPPS IAM PROJECT**

**TDIS Functionality and Support**

**User Group Presentation**

**March 25, 2021**

## **Section 1: Employee Portal and Delegated Admin Console**

# Section 1 Agenda

## 1. Texas.gov Digital Identity Solution (TDIS) Employee Portal – Enrollment/Initial Setup

- A. Initial enrollment steps that every single user of CAPPS must go through prior to accessing CAPPS once the IAM solution is live.

## 2. Self-Service Feature from TDIS Employee Portal

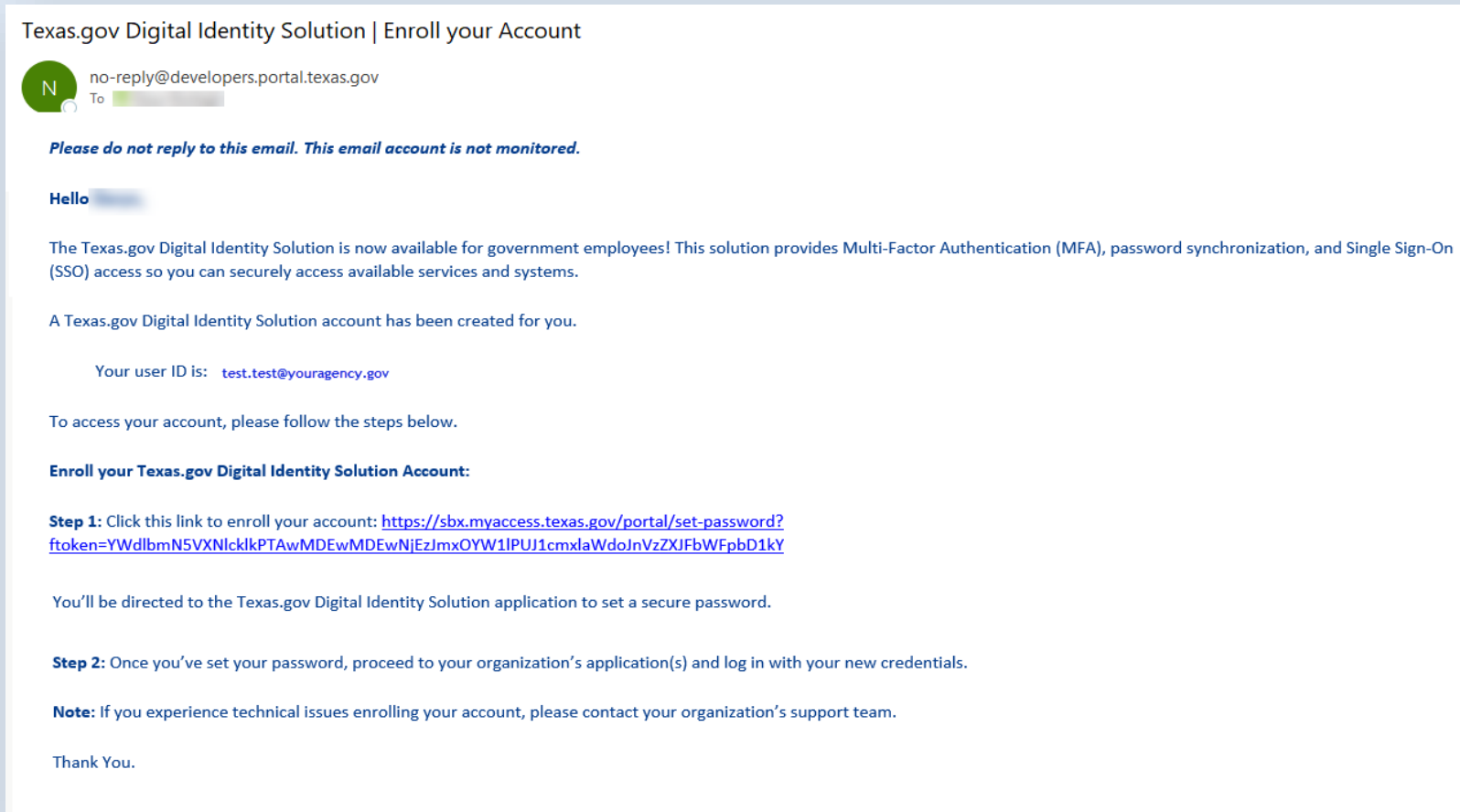
- A. Navigating to TDIS employee portal.
- B. Self-service actions using *Account Settings* in TDIS employee portal:
  - i. Password reset.
  - ii. Maintain security questions.
  - iii. Maintain phone number to receive one-time passcodes (OTPs) for multi-factor authentication (MFA).
- C. Forgot Password.

## 3. Delegated Administrator (DA) Console

- A. Navigating to *DA Console*.
- B. DA Actions – account unlocks, password resets and resending enrollment links.

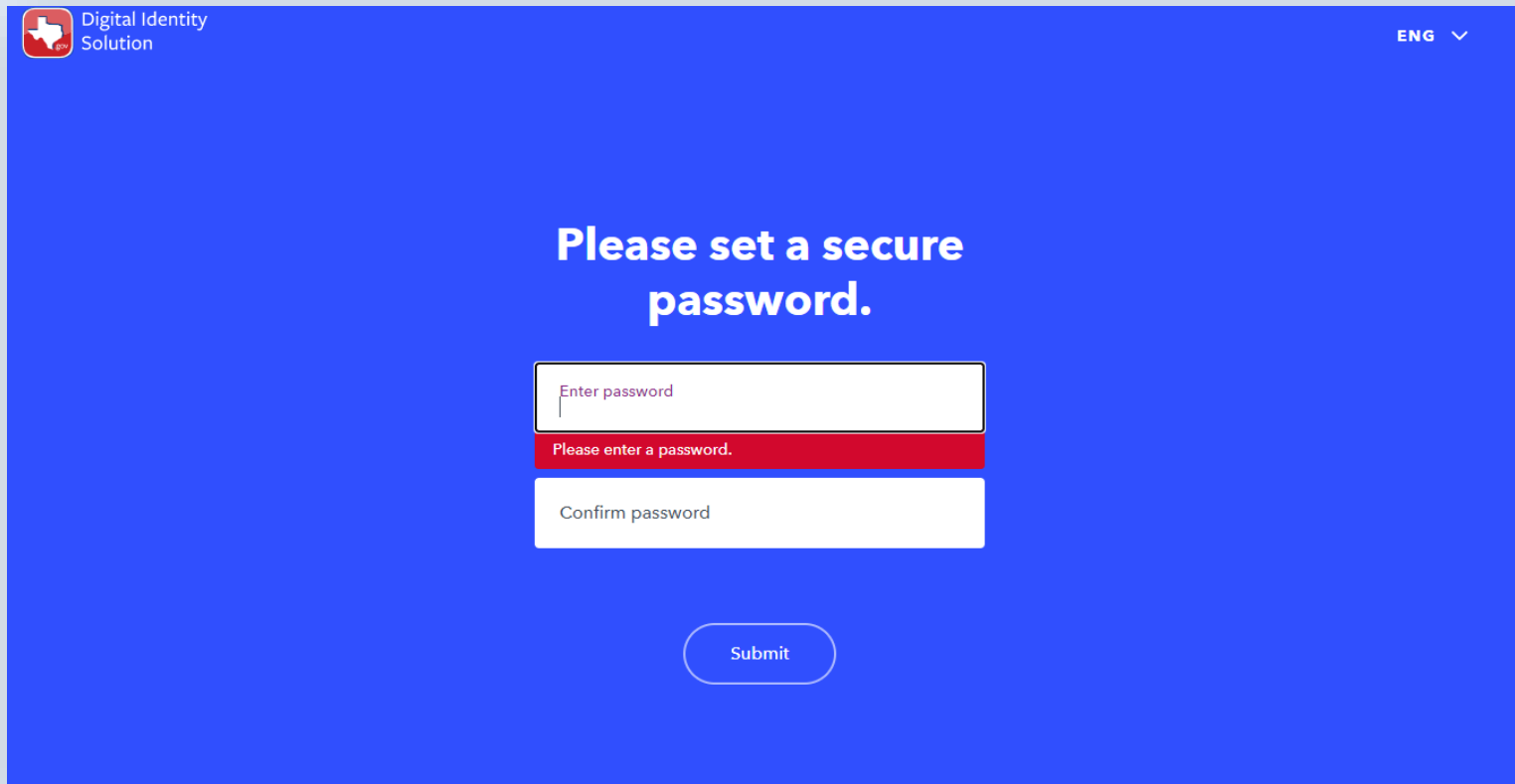
# TDIS Employee Portal: Initial Setup

All CAPPS users will receive an initial account enrollment email that contains enrollment information and instructions (including a link) to complete the employee account setup process.



# TDIS Employee Portal: Initial Setup

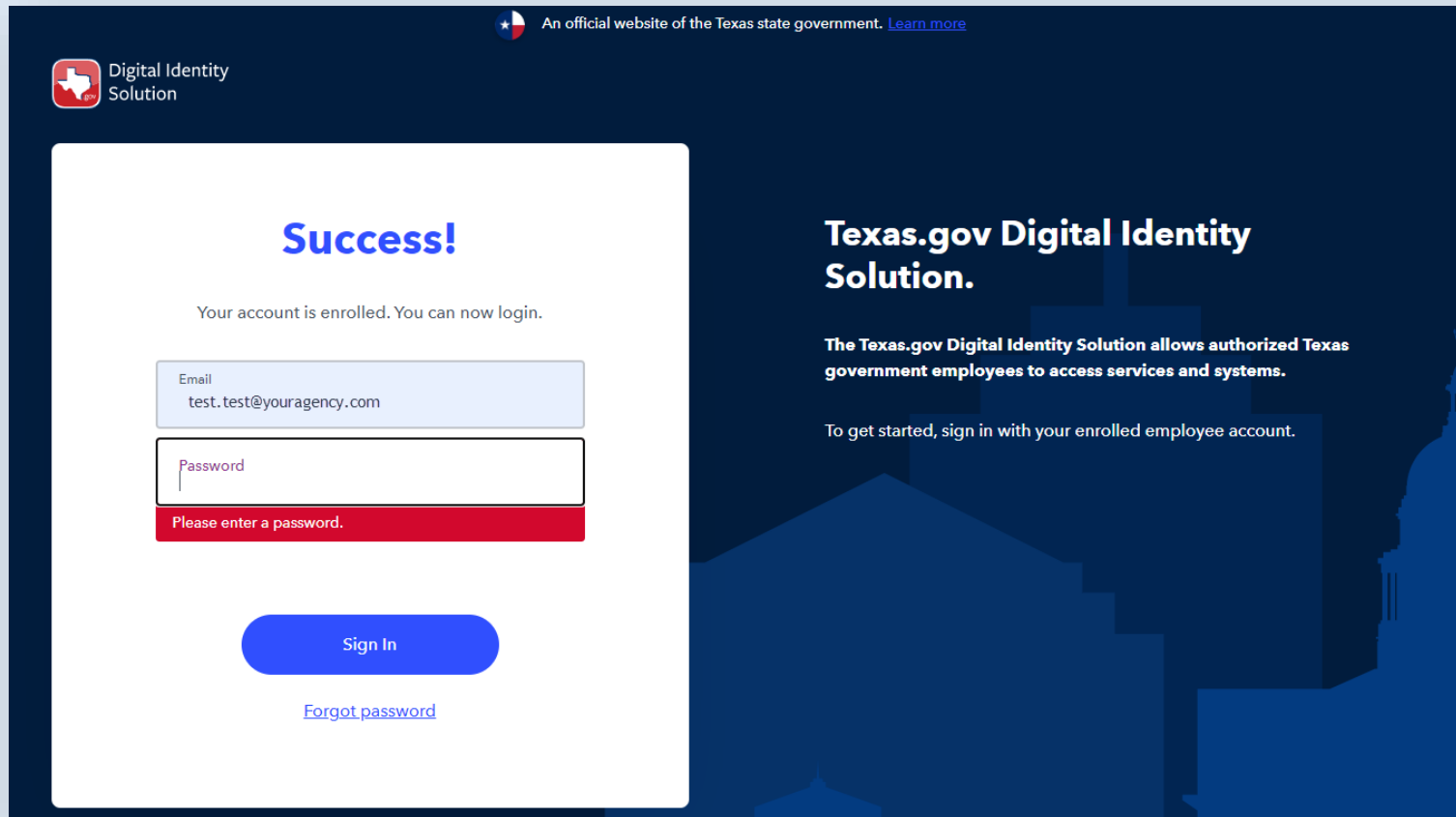
The link within the enrollment email is unique to each CAPPs user and routes the user to a Texas Digital Identity Solution (TDIS) page requesting them to set their secure password.



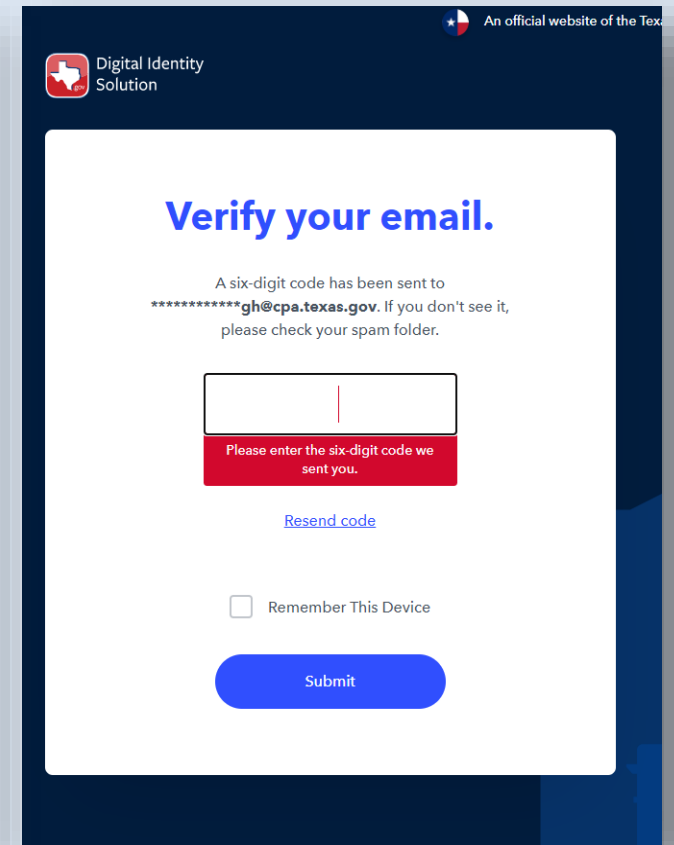
The screenshot shows a web interface for the Texas Digital Identity Solution (TDIS). The background is a solid blue color. In the top-left corner, there is a logo consisting of a red square with a white outline of the state of Texas, followed by the text "Digital Identity Solution" in white. In the top-right corner, the text "ENG" is displayed next to a small downward-pointing chevron icon. The main content area is centered and contains the following elements: a large white heading "Please set a secure password.", a white rectangular input field with the placeholder text "Enter password", a red rectangular error message box containing the text "Please enter a password.", another white rectangular input field with the placeholder text "Confirm password", and a white rounded rectangular button with the text "Submit".

# TDIS Employee Portal: Initial Setup

Once a secure password is setup, the user is routed to the TDIS employee portal to login (with their agency email and the secure password established in the prior page). Users are then guided through a few initial verification steps.



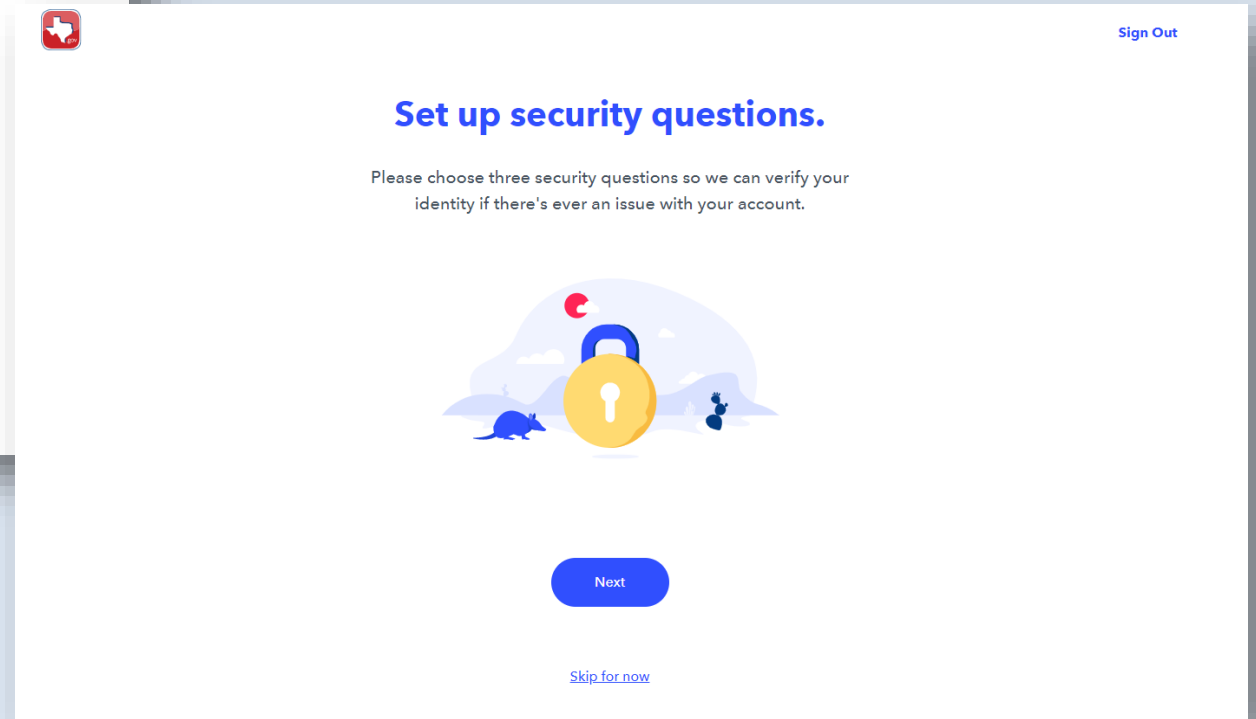
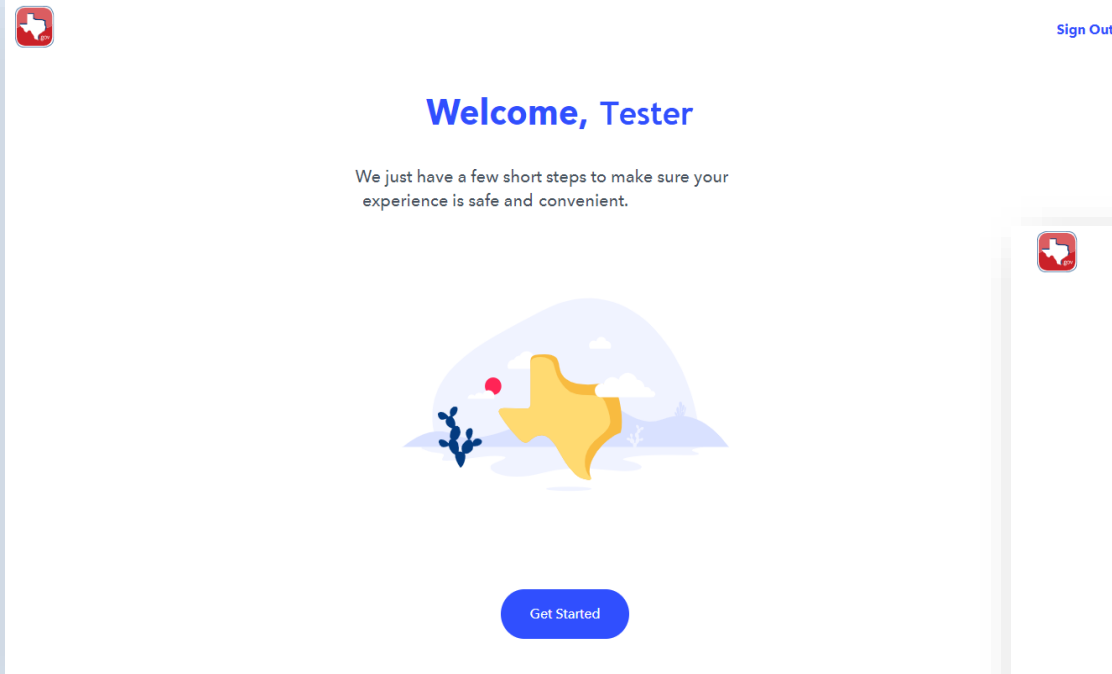
This screenshot shows the login interface for the Texas.gov Digital Identity Solution. The page has a dark blue header with the Texas state flag logo and the text "An official website of the Texas state government. [Learn more](#)". The main content area is white and features a "Success!" message: "Your account is enrolled. You can now login." Below this, there are input fields for "Email" (containing "test.test@youragency.com") and "Password". A red error message "Please enter a password." is displayed below the password field. A blue "Sign In" button is at the bottom, with a "[Forgot password](#)" link below it. To the right of the login form, there is a section titled "Texas.gov Digital Identity Solution." with a description: "The Texas.gov Digital Identity Solution allows authorized Texas government employees to access services and systems." and a prompt: "To get started, sign in with your enrolled employee account."



This screenshot shows the email verification interface for the Texas.gov Digital Identity Solution. The page has a dark blue header with the Texas state flag logo and the text "An official website of the Texas state government. [Learn more](#)". The main content area is white and features a "Verify your email." message: "A six-digit code has been sent to \*\*\*\*\*gh@cpa.texas.gov. If you don't see it, please check your spam folder." Below this, there is a red input field for the six-digit code, with a red error message "Please enter the six-digit code we sent you." below it. A blue "Resend code" link is below the input field. At the bottom, there is a checkbox labeled "Remember This Device" and a blue "Submit" button.

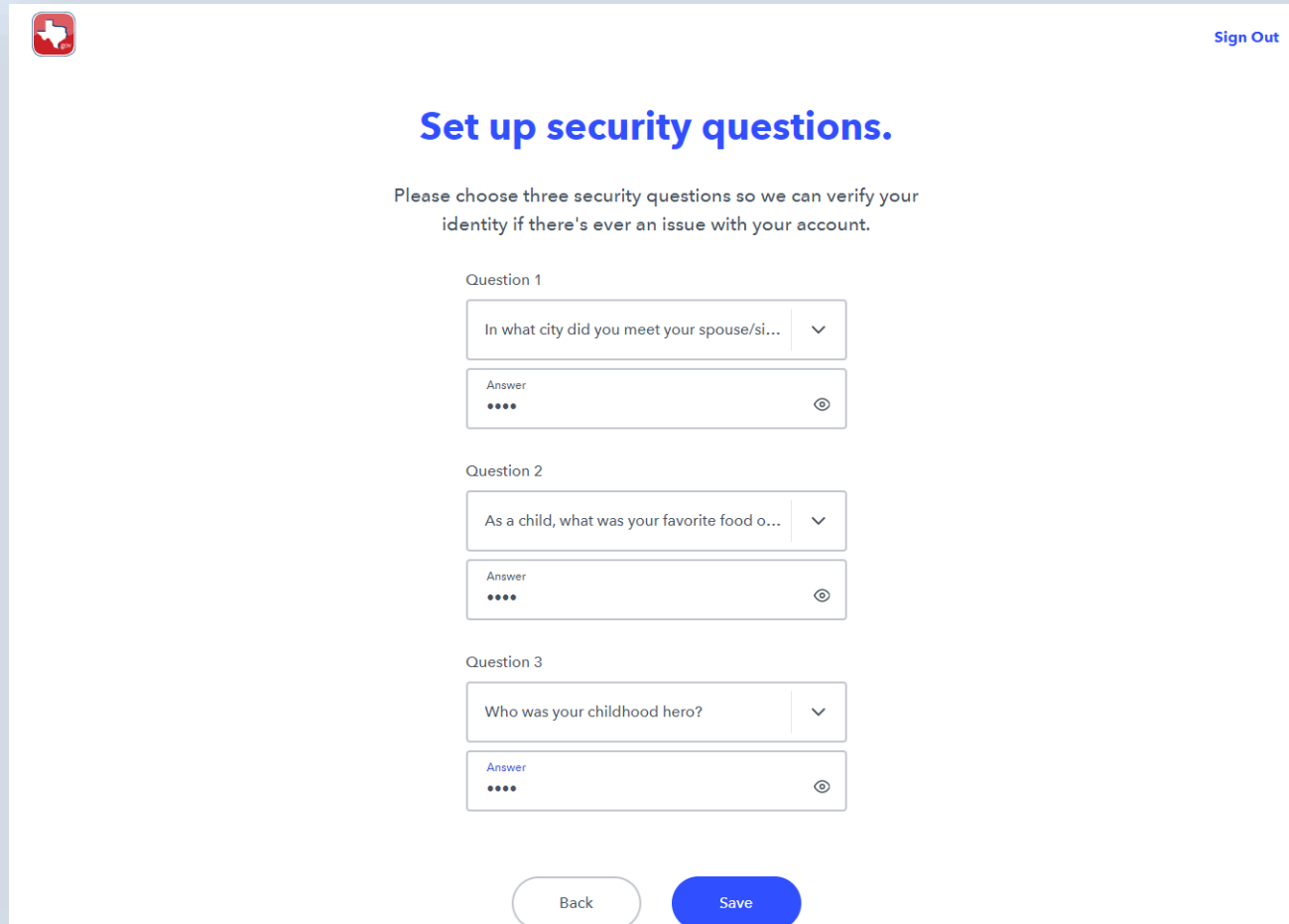
# TDIS Employee Portal: Initial Setup

Once the user is in the TDIS employee portal, they will be guided to set up security questions.




# TDIS Employee Portal: Initial Setup

The user must choose three security questions and provide their answers. These questions and answers can be used as an option for self-service *Forgot Password* functionality.



The screenshot shows a web page for setting up security questions. At the top left is a red square icon with a white outline of the state of Texas. At the top right is a blue link that says "Sign Out". The main heading is "Set up security questions." in blue. Below it is a paragraph: "Please choose three security questions so we can verify your identity if there's ever an issue with your account." There are three question sets, each with a dropdown menu for the question and a text input field for the answer. Question 1: "In what city did you meet your spouse/si..." with an answer field containing five dots. Question 2: "As a child, what was your favorite food o..." with an answer field containing five dots. Question 3: "Who was your childhood hero?" with an answer field containing five dots. At the bottom are two buttons: a white "Back" button and a blue "Save" button.

 [Sign Out](#)

## Set up security questions.

Please choose three security questions so we can verify your identity if there's ever an issue with your account.

Question 1

In what city did you meet your spouse/si... ▼

Answer  
.....

Question 2

As a child, what was your favorite food o... ▼

Answer  
.....

Question 3

Who was your childhood hero? ▼

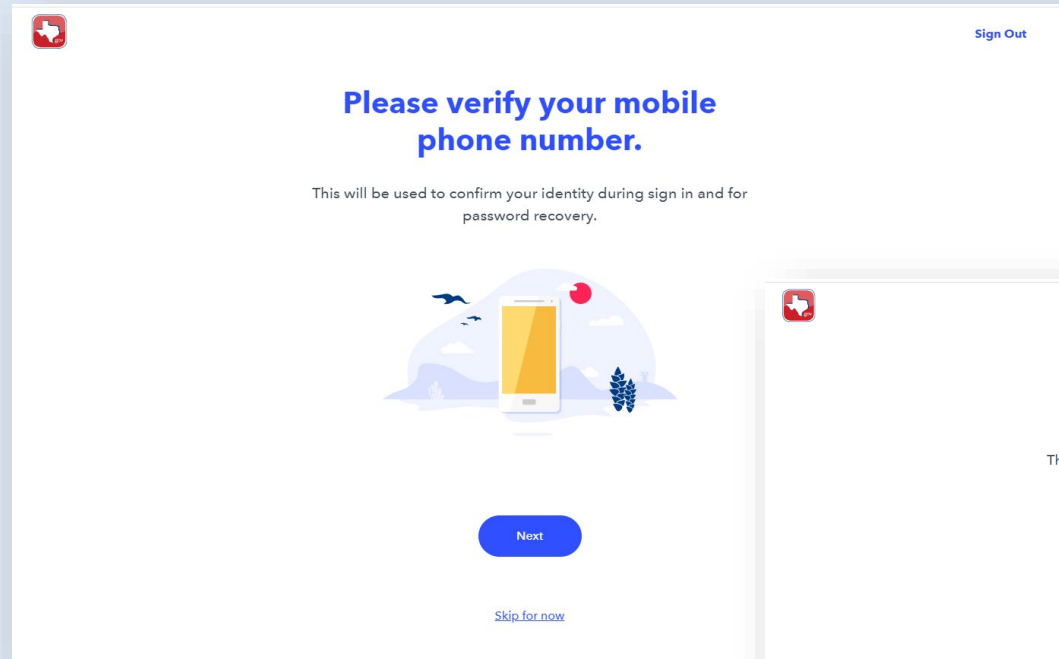
Answer  
.....

[Back](#) [Save](#)



# TDIS Employee Portal: Initial Setup

Next, the user is asked to enter and verify a cell phone number. This phone number is used for multi-factor authentication (MFA) only and **must** be able to receive text messages (SMS).

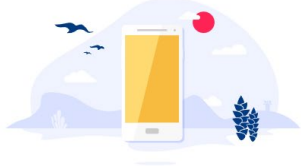


TDIS Employee Portal: Initial Setup - Please verify your mobile phone number.

Sign Out

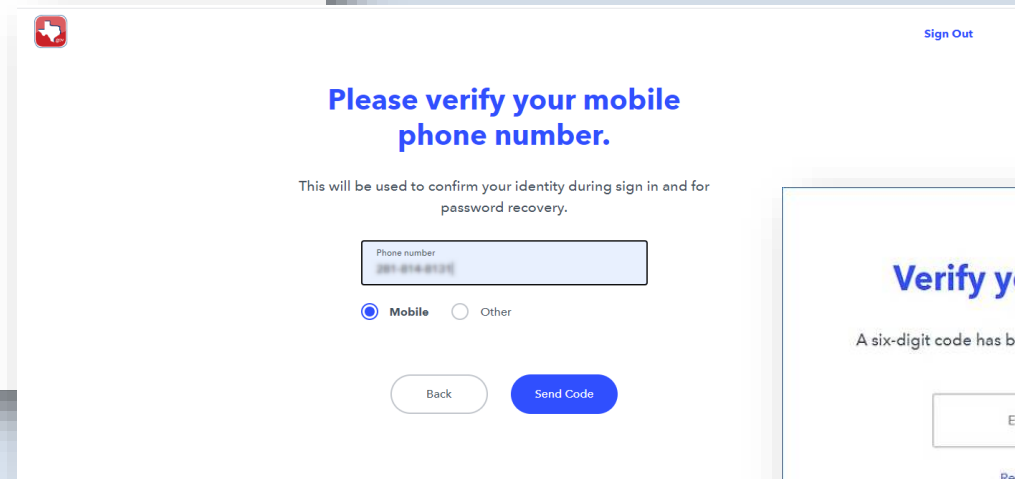
Please verify your mobile phone number.

This will be used to confirm your identity during sign in and for password recovery.



Next

[Skip for now](#)



TDIS Employee Portal: Initial Setup - Please verify your mobile phone number.

Sign Out

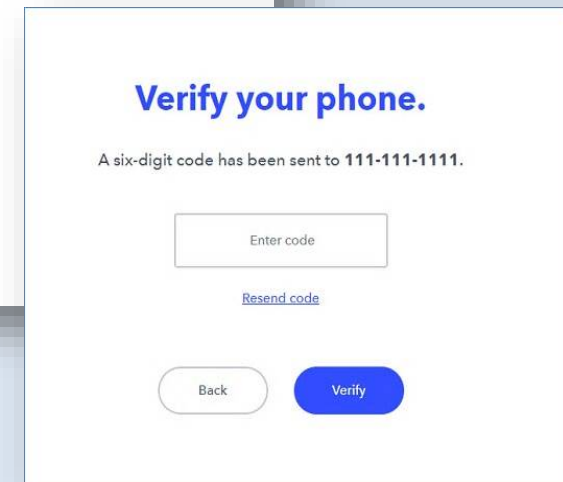
Please verify your mobile phone number.

This will be used to confirm your identity during sign in and for password recovery.

Phone number  
201-814-8131

☒ Mobile ☐ Other

Back Send Code



TDIS Employee Portal: Initial Setup - Verify your phone.

Verify your phone.

A six-digit code has been sent to 111-111-1111.

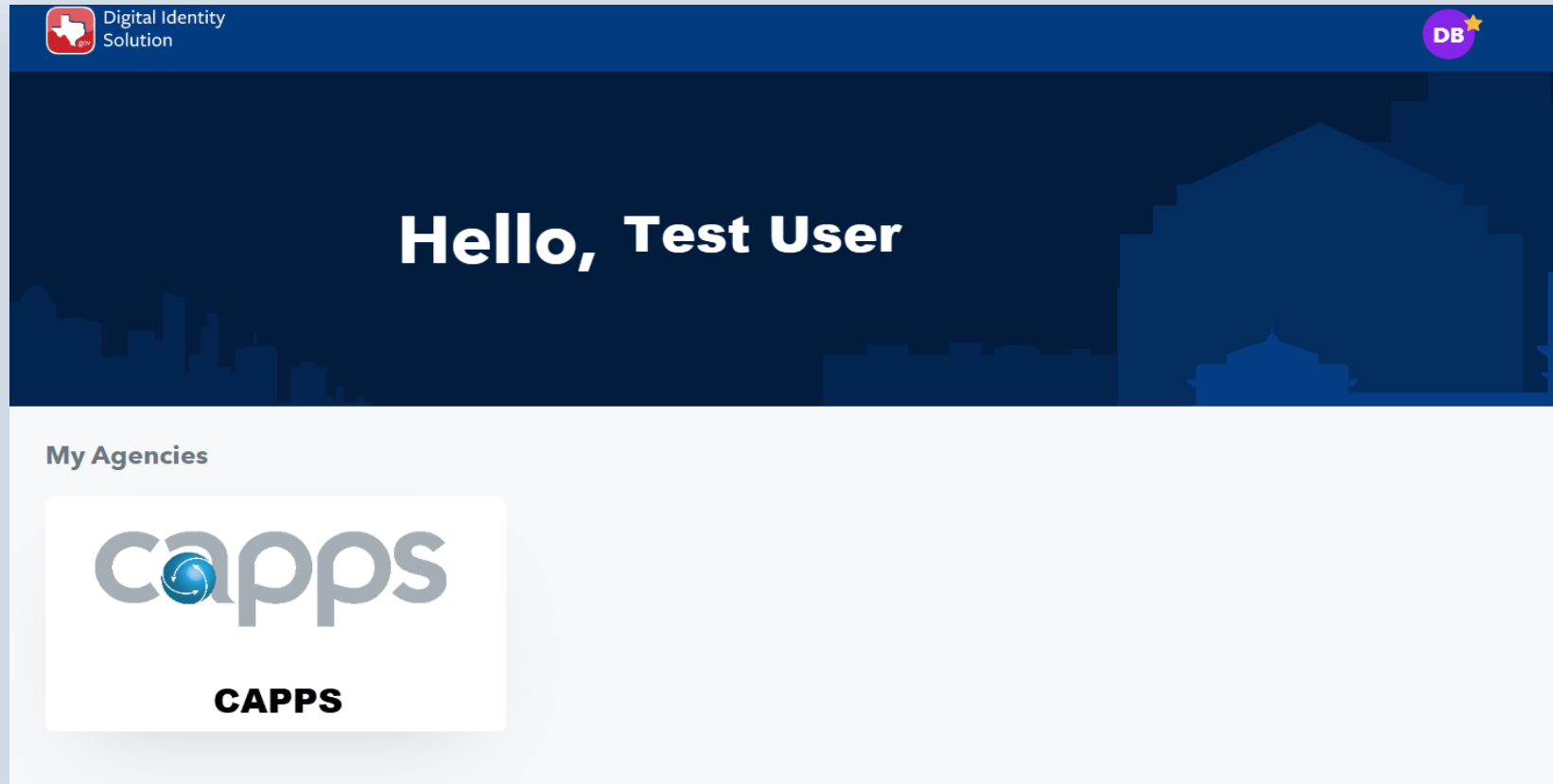
Enter code

[Resend code](#)

Back Verify

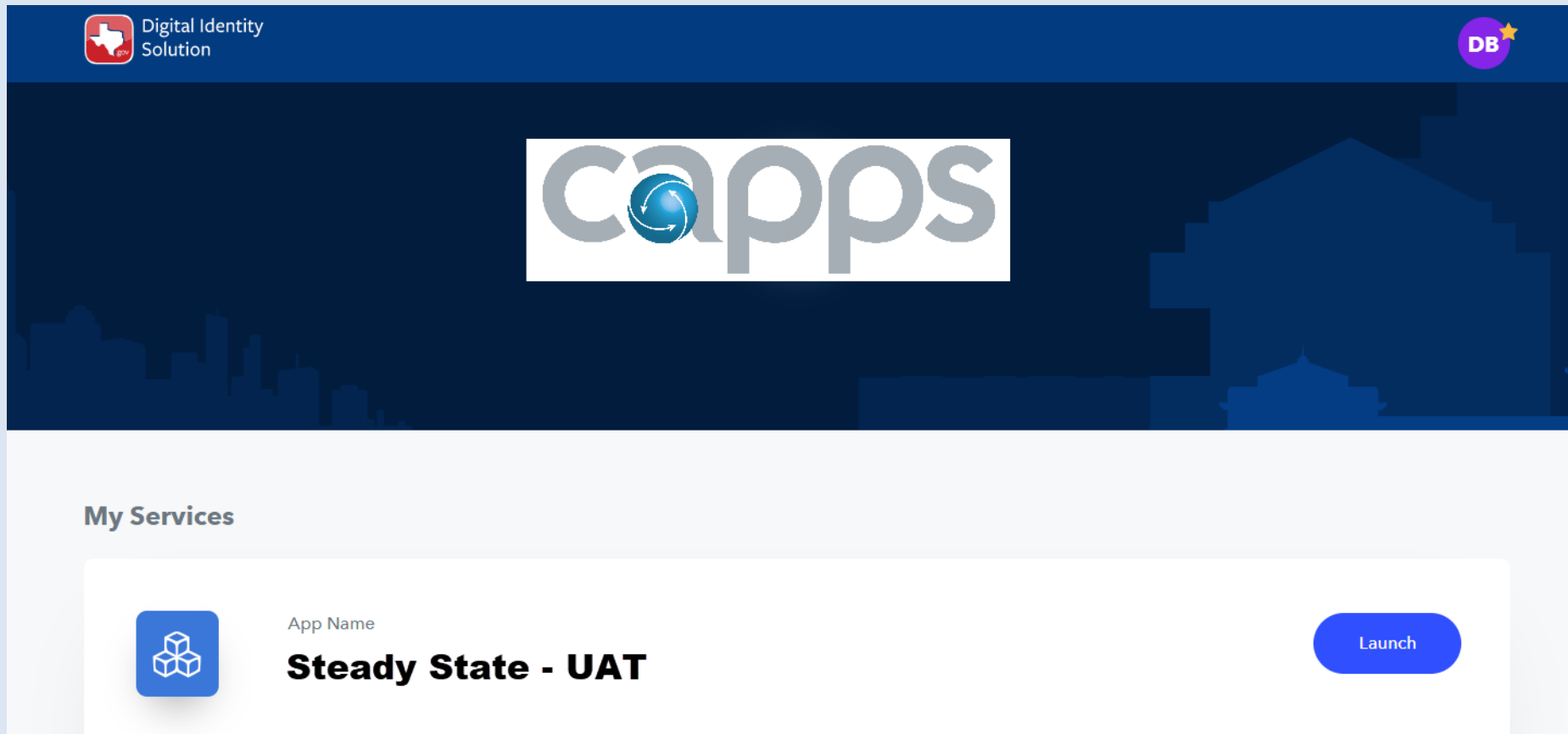
# TDIS Employee Portal: Initial Setup

Registration is now complete and users are routed to their new TDIS employee portal homepage.



# TDIS Employee Portal: Initial Setup

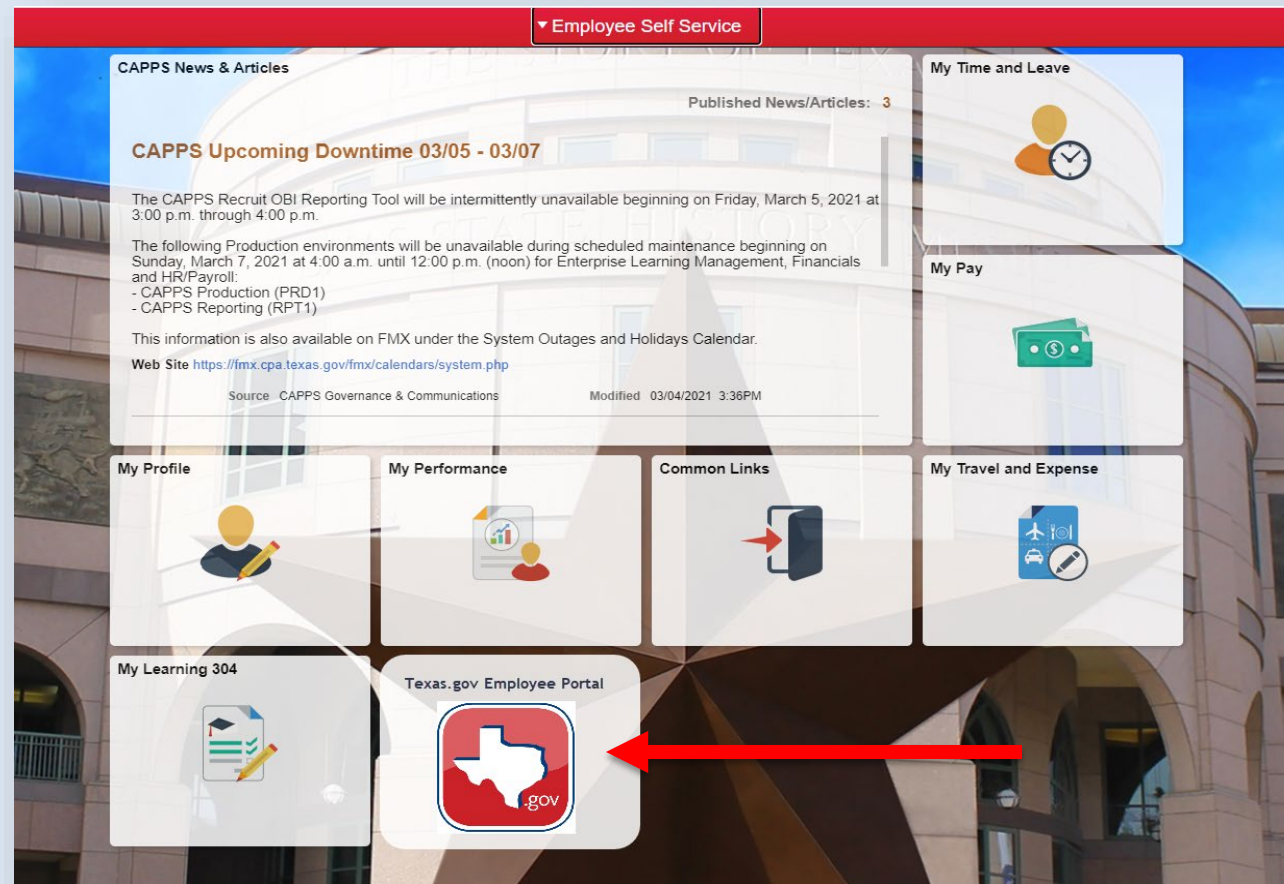
After registration is complete, users can launch the CAPPS application by clicking the CAPPS logo on the **My Services** page.



# TDIS Employee Portal: Self-Service Features

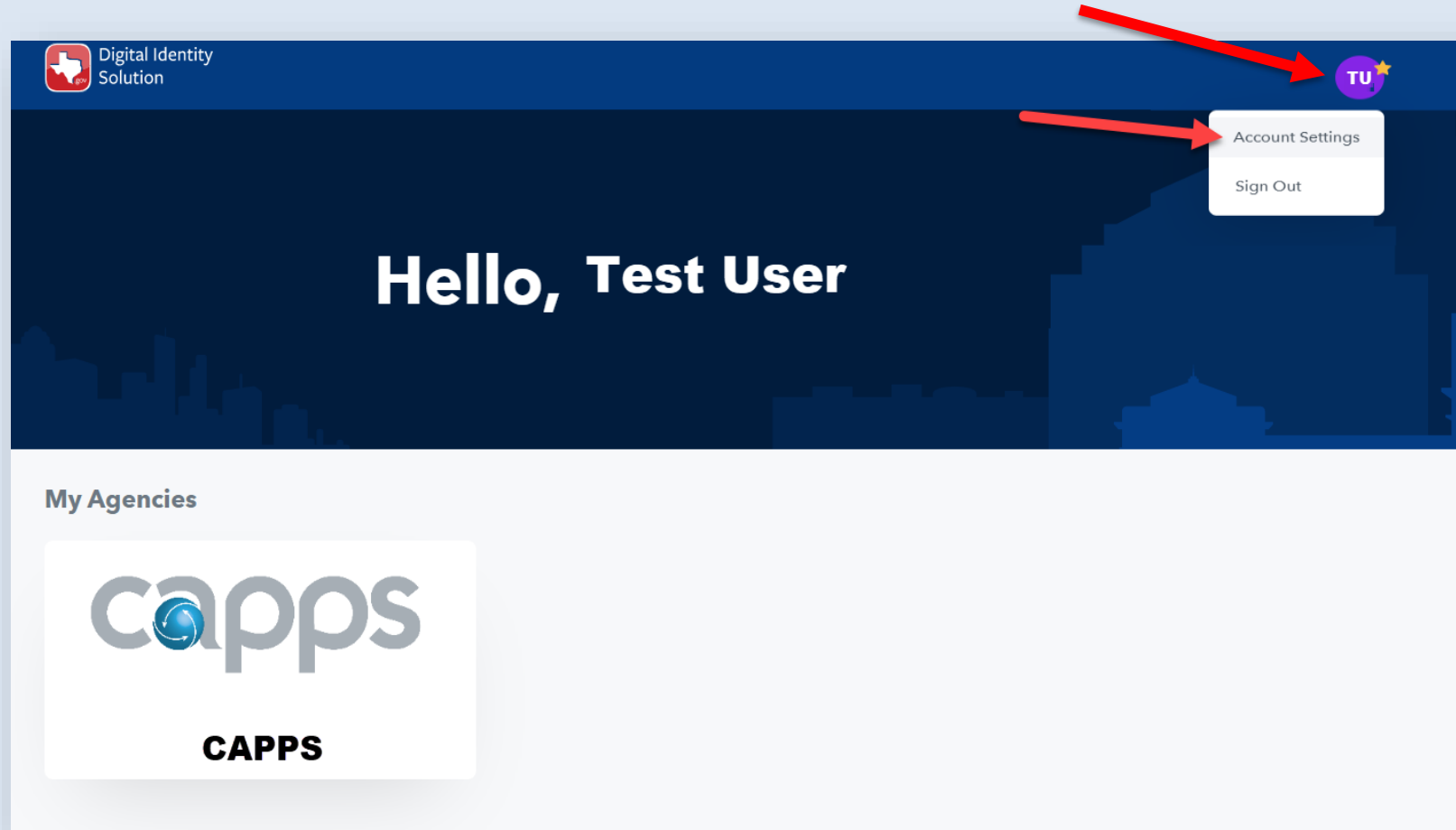
Navigation to the TDIS **Employee Portal** can be accessed by one of two ways. Use either the:

- 1) TDIS employee portal URL
- 2) New **Employee Portal** tile on the CAPPS on the *Employee Self-Service* dashboard (HCM SR #27321)



# TDIS Employee Portal: Self-Service Features

The **Account Settings** are available through the TDIS homepage by clicking the icon in the top right corner. The round icon above contains the user's initials.



# TDIS Employee Portal: Self-Service Features

The **Account Settings** page allows users to update the user's:

- Phone number used for the user's MFA
- Password
- Security questions

To make updates, click **Edit** located in the upper right-hand corner of the users **Profile**, **Password** or **Security questions** area.

**Digital Identity Solution** **DB**

## Account Settings

### Profile

Full Legal Name  
[Redacted]  
[EDIT]

Display Name  
[Redacted]  
[EDIT]

Email  
[Redacted]  
[EDIT]

Phone  
[Redacted]  
[EDIT]

### Password & Security

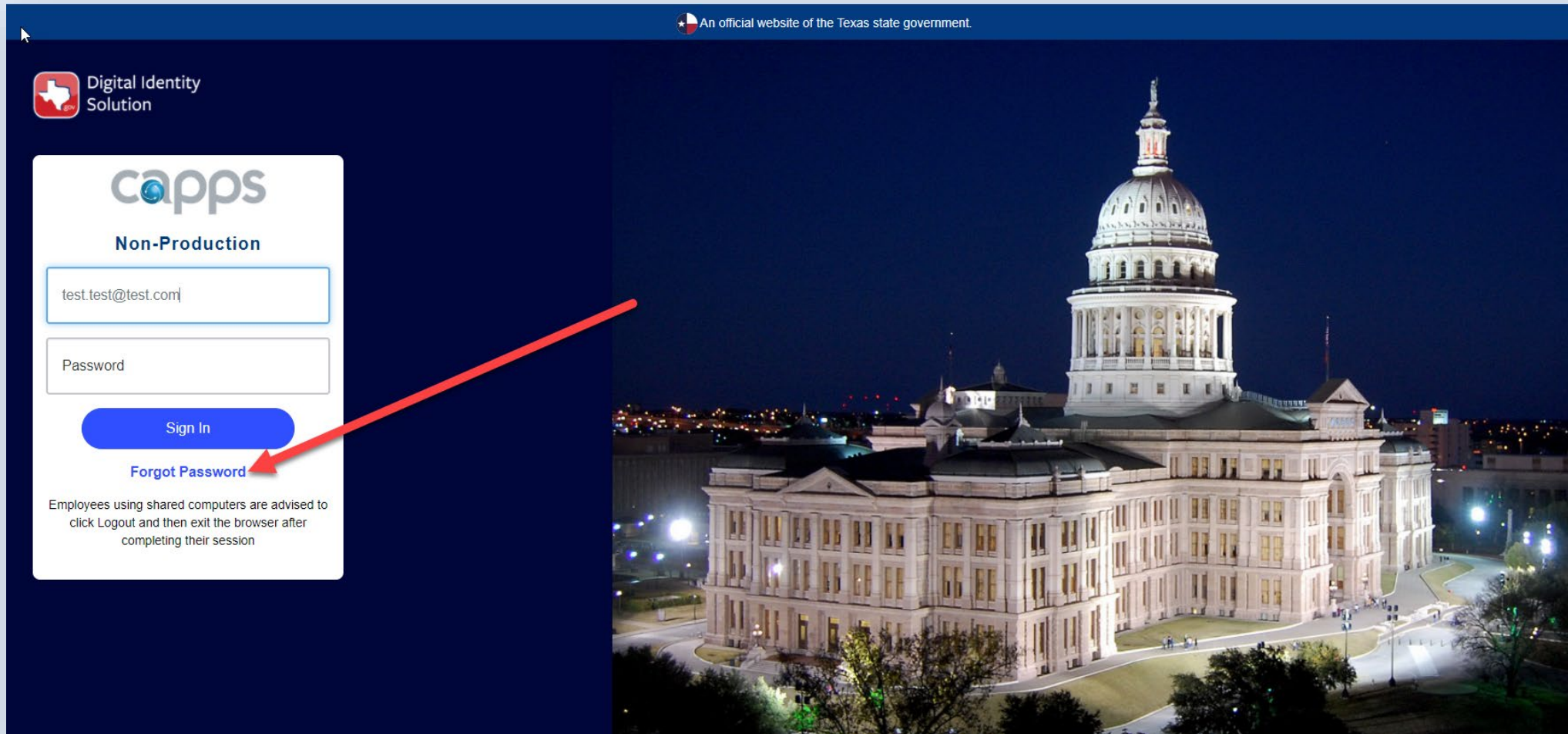
Password  
\*\*\*\*\* (Last updated 3/17/2021)  
[EDIT]

Security questions  
[EDIT]

In what city did you meet your spouse/significant other?  
As a child, what was your favorite food or snack?  
Who was your childhood hero?

# TDIS Employee Portal: Self-Service Features

The **Forgot Password** link is available on the CAPPS sign on page.

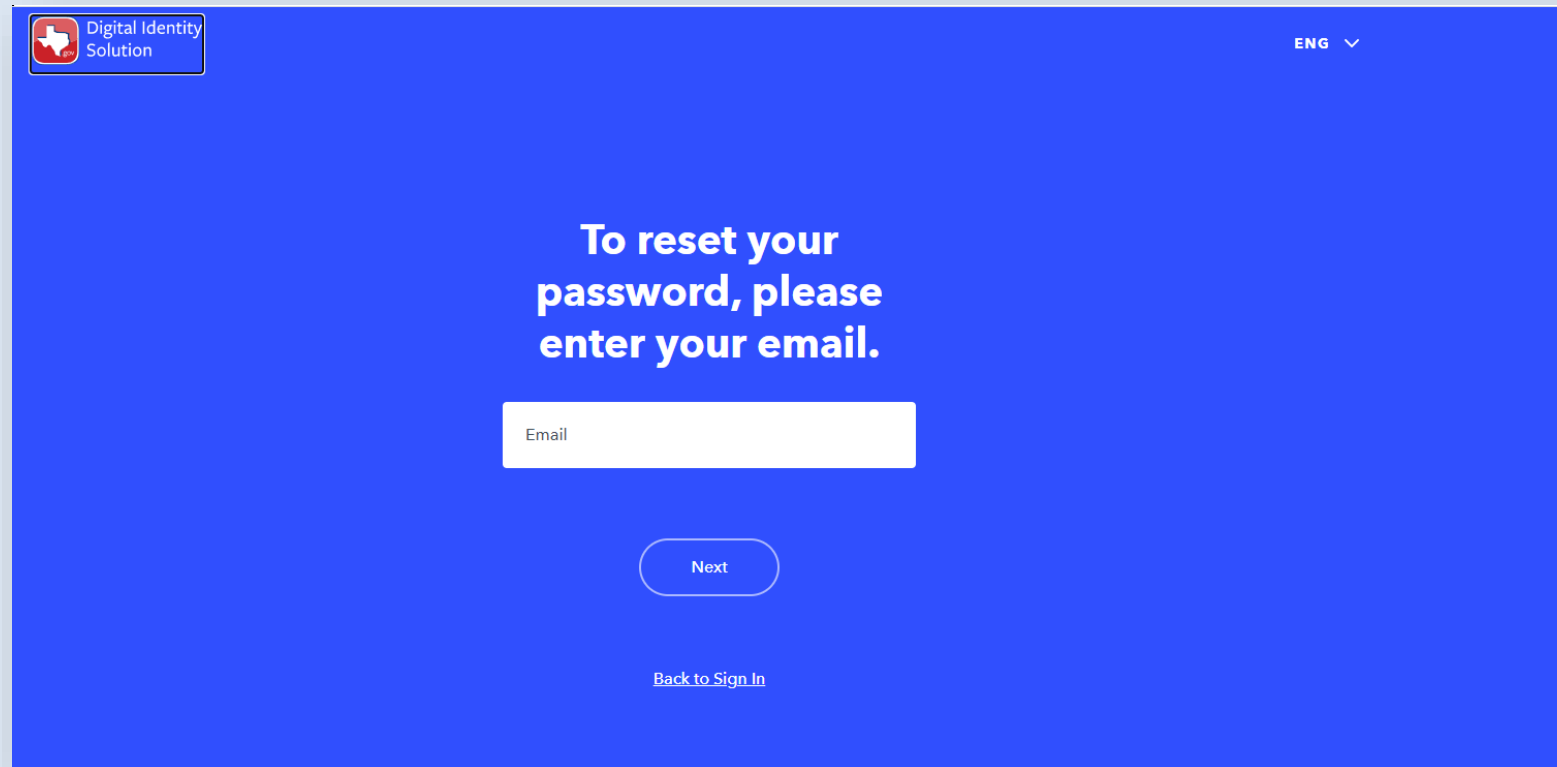


The screenshot shows the CAPPS Non-Production sign-in page. At the top, a blue banner reads "An official website of the Texas state government." Below this, the "Digital Identity Solution" logo is visible. The main sign-in area is a white box containing the "capps" logo, the text "Non-Production", a text input field with "test.test@test.com", a password input field labeled "Password", a blue "Sign In" button, and a blue "Forgot Password" link. A red arrow points from the "Forgot Password" link to the right. Below the sign-in box, a note states: "Employees using shared computers are advised to click Logout and then exit the browser after completing their session". The background of the page is a night-time photograph of the Texas State Capitol building.

# TDIS Employee Portal: Self-Service Features

If the user clicks the **Forgot Password** link, a series of steps are required to be completed to reset the password.

- 1) Enter the email associated with the account.



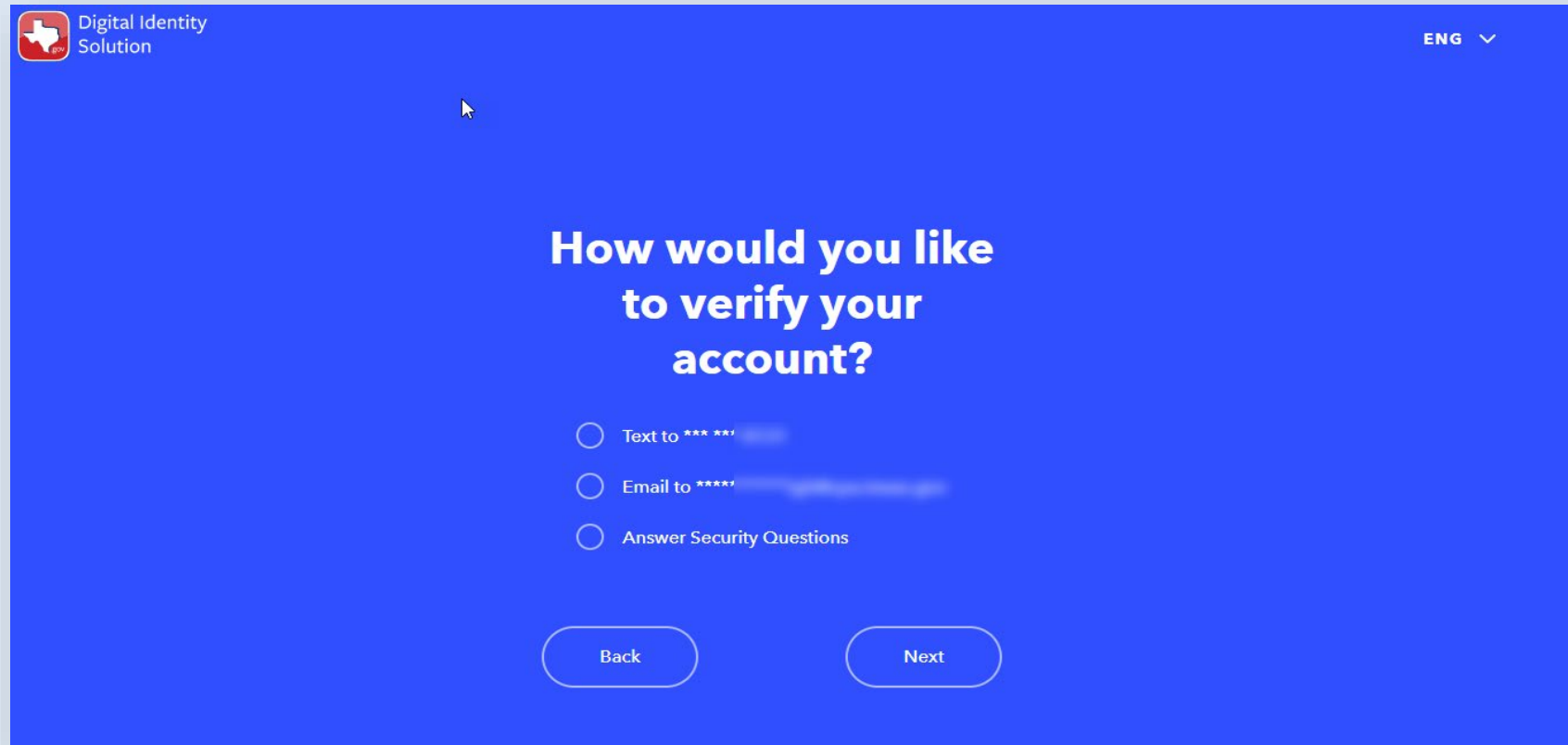
The screenshot shows a web interface for password reset. In the top left corner, there is a logo for 'Digital Identity Solution' featuring a red square with a white outline of the state of Texas. In the top right corner, the text 'ENG' is followed by a downward-pointing chevron. The main content area has a blue background. Centered on the page is the text 'To reset your password, please enter your email.' in white. Below this text is a white rectangular input field with the placeholder text 'Email'. Underneath the input field is a white rounded rectangular button with the text 'Next'. At the bottom of the page, there is a blue link that says 'Back to Sign In'.



# TDIS Employee Portal: Self-Service Features

2) The user must choose the method preferred of account verification.

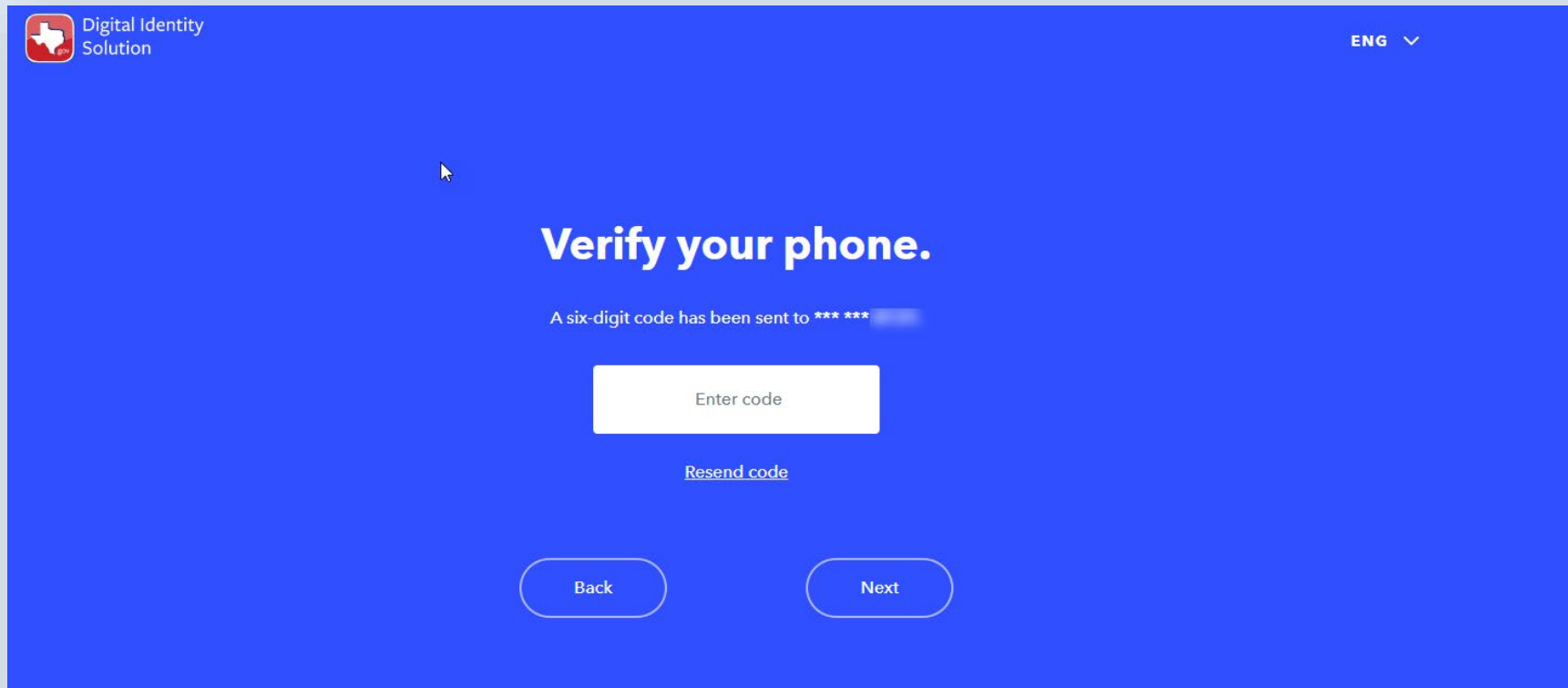
If users did not use a cell phone number or set up security questions, then an email is the only option available in this step.



The screenshot shows a blue interface for the 'Digital Identity Solution'. In the top left corner is a logo with a red square containing a white outline of Texas, followed by the text 'Digital Identity Solution'. In the top right corner, 'ENG' is displayed with a downward arrow. The main heading in the center is 'How would you like to verify your account?'. Below this heading are three radio button options: 'Text to \*\*\* \*\*', 'Email to \*\*\*\*\*', and 'Answer Security Questions'. At the bottom of the screen are two rounded rectangular buttons labeled 'Back' and 'Next'.

# TDIS Employee Portal: Self-Service Features

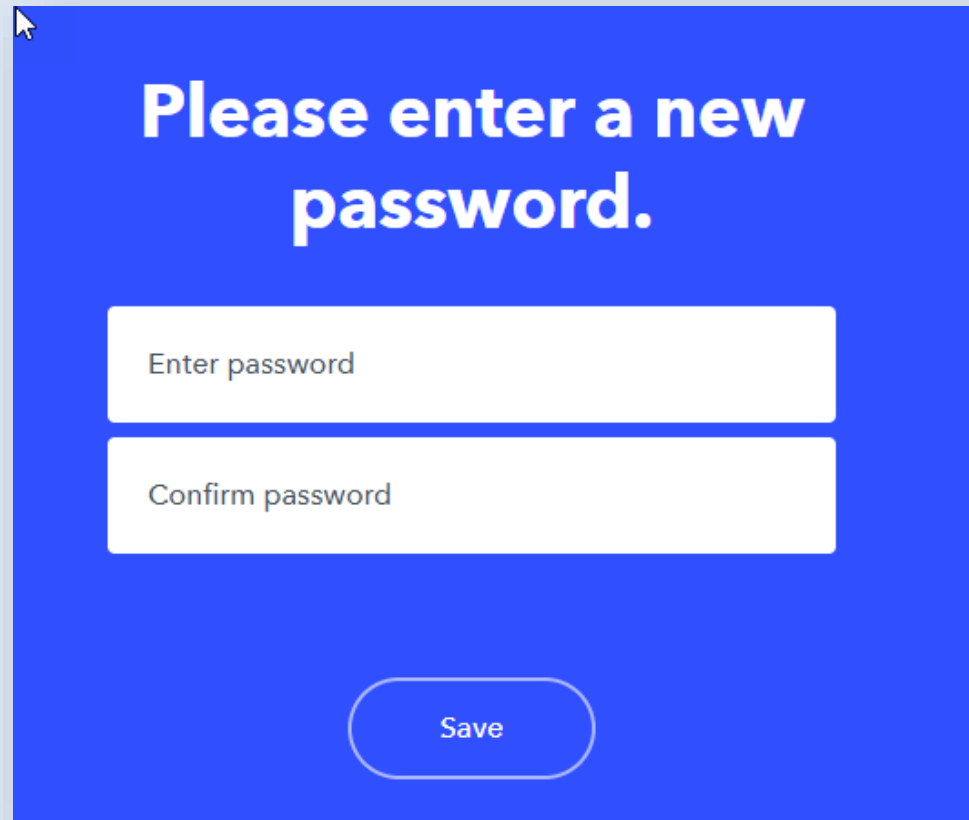
- 3) If the user chose the email or phone number as the verification method, the user is asked to enter a one-time six-digit passcode that was sent to that device. If they chose to use security questions, answering two security questions correctly is required for access.



The screenshot shows a blue verification screen for the 'Digital Identity Solution'. In the top left corner is a logo with a red square containing a white outline of Texas, followed by the text 'Digital Identity Solution'. In the top right corner, 'ENG' is displayed next to a downward-pointing chevron. The main heading in the center is 'Verify your phone.' Below this, a message states 'A six-digit code has been sent to \*\*\* \*\*'. A white rectangular input field with the placeholder text 'Enter code' is centered below the message. Underneath the input field is a blue, underlined link that says 'Resend code'. At the bottom of the screen are two white, rounded rectangular buttons: 'Back' on the left and 'Next' on the right.

# TDIS Employee Portal: Self-Service Features

- 4) The user must enter and confirm their new password. Then click **Save**.



**Please enter a new password.**

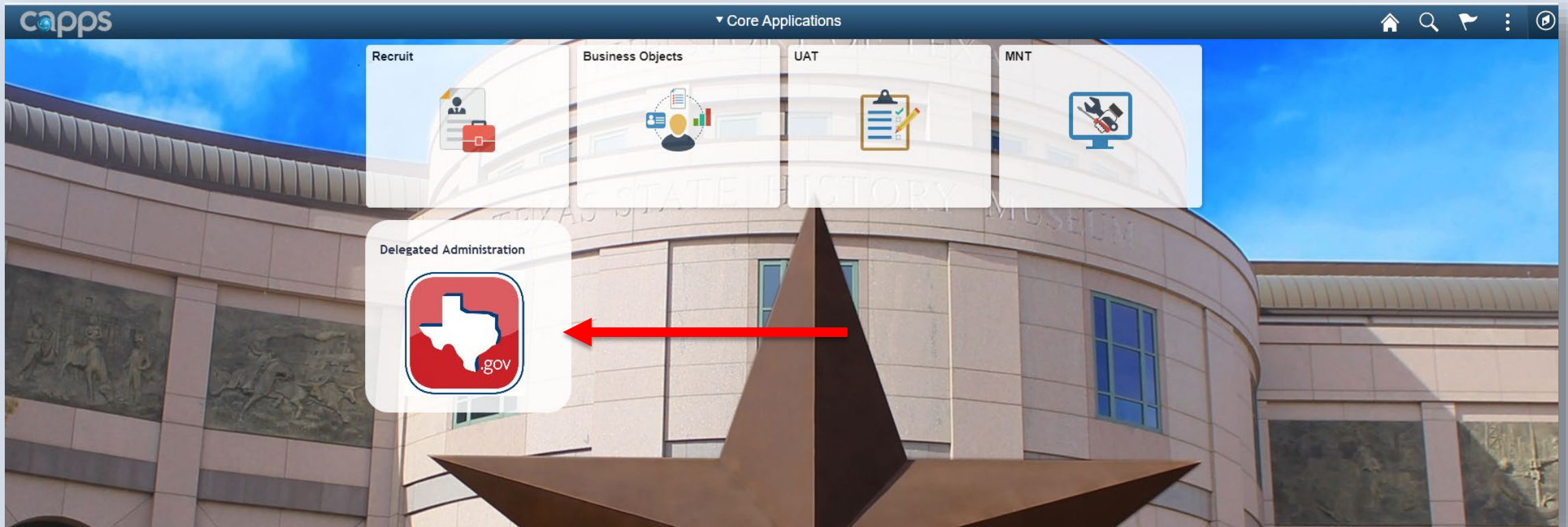
Enter password

Confirm password

Save

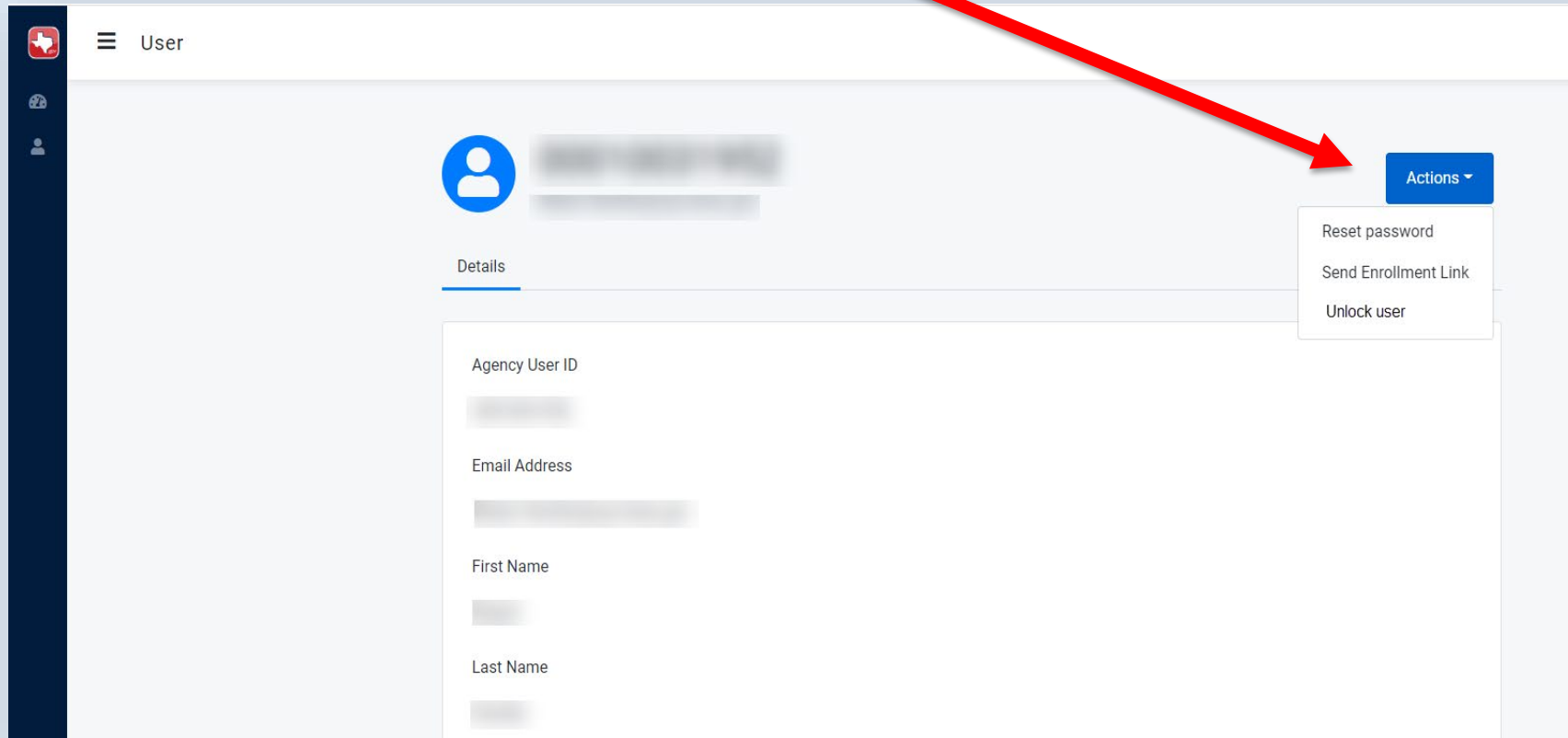
# Delegated Administrator (DA) Console

Delegated Administrators (DA) are able to seamlessly navigate to the DA Console using a new tile located on the **Core Applications** dashboard.



# Delegated Administrator (DA) Console

Once the DA Console is accessed, the DA sees a list of users at their agency. The DA can search for the user that requested assistance. After a user is selected, a series of fields display that are associated with that user, as well as an **Actions** button.



## **Section 2: Agency Support**

# Agency Support for TDIS: Employee Portal

The following actions are available to all users in the TDIS Employee Portal:

- Change password
- Add or change a cell phone number for the one-time passcode (OTP) authentication
- Change or update the security question(s)

Users (employees) may complete these actions on their own, without assistance from a TDIS Delegated Administrator.

**Remember:** Any time an employee is able to complete an action in the *TDIS Employee Portal*, they should be encouraged to do so.

# Agency Support for TDIS: DA Console

The following actions are available in the TDIS Delegated Administration (DA) Console:

- Initiate password reset email
- Unlock user account
- Resend a new enrollment link to users who did not complete the account registration process

DAs may complete these actions without assistance from CPA.



# Agency Support for TDIS: Contacting CAPPS Help

A Delegated Administrator (DA) may find that a question or issue has been raised that falls into one of the following two categories:

- A user (or DA) has attempted one of the actions covered by the Employee Portal or the DA Console unsuccessfully
- Some issue not covered by the actions available on the Employee Portal or the DA Console

If a DA finds that they need additional assistance, they may contact the **CAPPS HR/Payroll Help Desk** by email at [CAPPS.Help@cpa.texas.gov](mailto:CAPPS.Help@cpa.texas.gov) or by phone at 512-463-CAPP(2277), Option 3 (HR/Payroll).

**NOTE:** The CAPPS HR/Payroll team can assist delegated administrators (DAs) with all questions or issues concerning TDIS.

# Agency Support for TDIS: UAT

Two major objectives for TDIS implementation will be achieved during User Acceptance Testing (UAT):

- Script execution to ensure that functionality is behaving as expected.
- Each agency will determine how support will happen specific to it, including business processes and procedures for its own TDIS help desk support.

## **Section 3: User Acceptance Testing (UAT)**

# UAT Expectations

## Important Dates:

- Two UAT kick-off sessions will be held on:
  - April 6 — 1:30 p.m.
  - April 7 — 9:30 a.m.
- UAT registration and testing begins April 12.
- Six weeks of UAT — from April 12 through May 21.
- UAT acknowledgment is due by May 21.
- **Go-Live is June 7.**

# UAT Expectations

## Agency Actions:

- Designate a UAT coordinator via the SR ticket in Production ASP by close of business (COB) on April 1.
- Confirm agency delegated administrators and request the new the role via Security Request System (SRS) by COB April 5.
  - The role to request is: **TX\_SC\_IAM\_DELEGATED\_ADMIN**
  - A list of current users with the password reset role will be attached in ASP.
- Complete required test scripts within the first two weeks of UAT and the suggested scripts during Week 3 through Week 6.
  - A spreadsheet of required and suggested test scripts will be attached in ASP.

# UAT Expectations

## Agency Communications:

- All communications must go through the SR ticket in Production ASP.
- Weekly Progress updates are due in the SR ticket by COB each Thursday.
- Log each Issue identified during UAT in ASP so the issue can be tracked, validated and resolved by the CAPPS team.

# Thank You!

## Presenters:

- Daryn Burleigh
- Chelsa Vinklarek
- Paul Lyle

Please send any questions or concerns to the CAPPS Communications team at: [CAPPS.CGC.ba@cpa.texas.gov](mailto:CAPPS.CGC.ba@cpa.texas.gov)

